Spectrum Portal
User Manual:
Grant Applicants

aaf.spectrumportal.net

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Spectrum Portal User Manual

Requirements, Roles Defined, and Workflow for Grant Applicants

WELCOME TO THE SPECTRUM PORTAL

To use the Amarillo Area Foundation's online portal (*aaf.spectrumportal.net*) you must first be granted access to it. Access to the Spectrum Portal occurs when one registers and subsequently is processed.

****NOTE: use Internet Explorer as your internet browser** as you will experience lost functionality in other browsers*.

DEFINITIONS OF ROLES

When you register on the Spectrum Portal, you must select the access you need. The options include:

Scholarship Applicant – Allows students to apply for and track scholarships (High School and College Students)

Grant Applicant – Allows an individual to apply for and track grants online (on behalf of an organization)

Organization Administrator (Org Admin) – A role reserved for the person who will oversee all users for a specific organization. This person controls the level of access (View, Edit, Submit, Mine, or None) for portal users who register and indicate they are associated with the organization.

Reviewer – Allows Scholarship Selection Committee Members or Grant Review Committee Members to review and score scholarship or grant applications online

WORKFLOW FOR REGISTERING IN SPECTRUM

Before registering, we recommend you take some time to think through what online portal roles are appropriate for the individuals in your organization. Spectrum Portal users from an organization must register in a specific order, therefore all Spectrum Portal users from that organization should work together to determine Spectrum Portal roles and responsibilities.

1. *First, the Organization Administrator registers at aaf.spectrumportal.net*
    a. The Org Admin will control the level of access for portal users who register and associate themselves with the organization *(Note: Org Admin may also select "Grant Applicant" role.)*
    b. Each organization is required to have one Org Admin and can have more than one; however, it is not recommended to have more than two.
2. *Organization Administrator is approved*
    a. Org Admin role must be approved by the Amarillo Area Foundation staff
    b. AAF will send an e-mail to the Org Admin when this role is approved
3. *Grant Applicant Registers at aaf.spectrumportal.net*
    a. The Org Admin can be a different individual than the Grant Applicant; however, if the Org Admin will need access to enter information into grant applications they will also need to select the Grant Applicant role
    b. Each organization can have as many Grant Applicants registered in the portal as they wish
    c. Grant applicant role is automatically approved; however a Grant Applicant is NOT automatically tied to an organization until registration has been processed and Org Admin allows access
4. *Grant Applicant organization is approved*
    a. The Org Admin will receive notifcation that a Grant Applicant has registered with the organization. The Org Admin will select the level of access the Grant Applicant has within the organization (i.e. Admin, View, Submit, None - See page 14 for detail on the levels of access.)
    b. Grant applicant may now work with Grant Applications for the organization

**How to Register via the Spectrum Web Portal**

aaf.spectrumportal.net ⬅

Type this into web browser.

*Use **Internet Explorer** (Functionality is lost in other web browsers)

aaf.spectrumportal.net

New/Existing Users will see the following page below.
- *Existing users* should "Log On" using their username (email) and password.
- *New users* should "Register."

Welcome to the Web Portal

Please Log On

Or use this link to Register
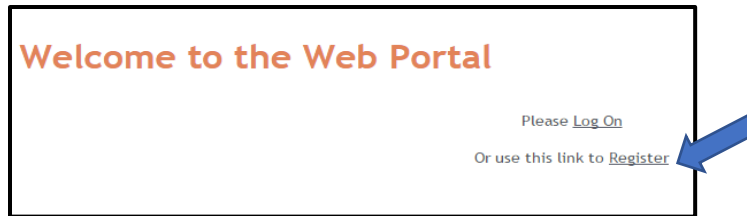
New registrants will be asked for registration information. Fields that have a red asterisk are required. (*)
NOTE: your *email address becomes your username*. Two people cannot use the same e-mail address to register in the Spectrum portal. Each user's e-mail address must be unique.

Welcome to the Web Portal

Create a Profile

Account Information

First Name		*	Last Name		*
Email Address		*			
Password		*			
Re-enter your Password		*			
Password Hint		*			

Select the access you need. (Usually only one is selected, unless you are both Org Admin *and* Grant Applicant.)

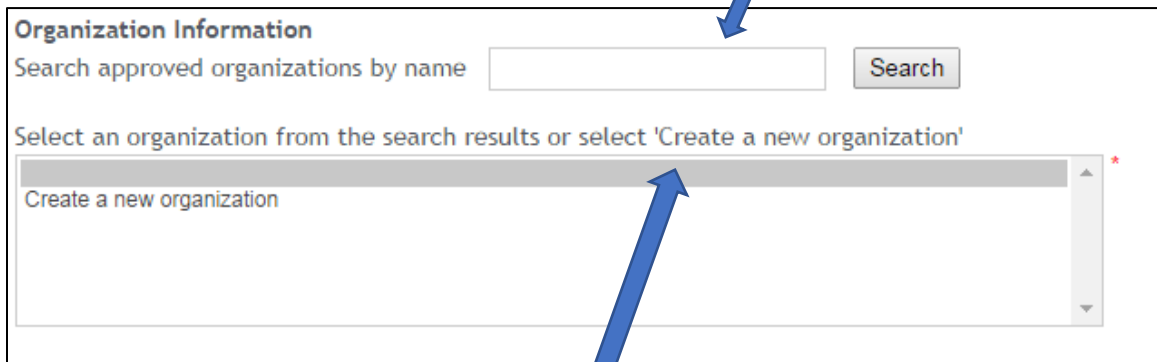| Portal Access*		
☐	Scholarship Applicant	High School and College Students who wish to apply for scholarships
☐	Grant Applicant	Apply for grants on behalf of an organization. (Please note that the Organization Admin will determine what level of access you have. Possible levels of access include: View, Edit, Submit, Mine, or None.)
☐	Organization Admin	This person will control the level of access for portal users who register with your organization (usually the Executive Director or Director of Development).
☐	Reviewer	Reserved for Scholarship Selection Committee members and Grant Review Committee members.

*Some access requires approval. Please do not select access that you do not need!

How to Register via the Spectrum Web Portal continued

If a registrant requests the Organization Admin or Grant Applicant role, they will be required to add Organization Information for which they would be applying. This next section allows the registrant to search for and use the Foundation's existing records OR create a new organization.

NOTE: Most organizations are already in the Foundation's records, so please search for your organization thoroughly. If you believe that your organization should be in the records (i.e. has received a previous grant or applied for a grant before) but you cannot find it, please call the Foundation (806.376.4521) or e-mail grants@aaf-hf.org and we will help you locate your organization.

TIP: If your org name does not yield results based on what you type in, try using one word from the org name. (Ex: Type "Spectacular" instead of "Spectacular Independent School District")

Organization Information

Search approved organizations by name [   ] Search

Select an organization from the search results or select 'Create a new organization'

Create a new organization

TIP: Curser should be on the **blank line** (and not on "Create a new organization") when clicking "Search" button.

If your search is successful, the name of your organization will appear in the box below the words "Create a new organization." Double click on the title of your organization to pull in the information to your registration.

NOTE: If you found your organization, but the information is incorrect, do not create a new one. Instead, contact AAF.

If you have tried searching for your organization multiple ways and are confident it is not already in AAF's system, please select "Create a new organization."

How to Register via the Spectrum Web Portal continued

After highlighting and clicking "Create a new organization," you will see the following:

Organization Information

Search approved organizations by name [ ] Search

Select an organization from the search results or select 'Create a new organization'

Create a new organization

New organizations must be approved before you can use them to log in

Organization [ ] *

Tax ID [ ] *

Address (line 1) [ ]

Address (line 2) [ ]

City [ ] *

State [▼] *   Zip [ ]

Phone # [ ] *

Website [ ]

Personal Information

Copy Address Information From Organization

Address (line 1) [ ]

Address (line 2) [ ]

City [ ]

State [▼]   Zip [ ]

Primary Phone # [ ]   Phone Type [▼]

Secondary Phone # [ ]   Phone Type [▼]
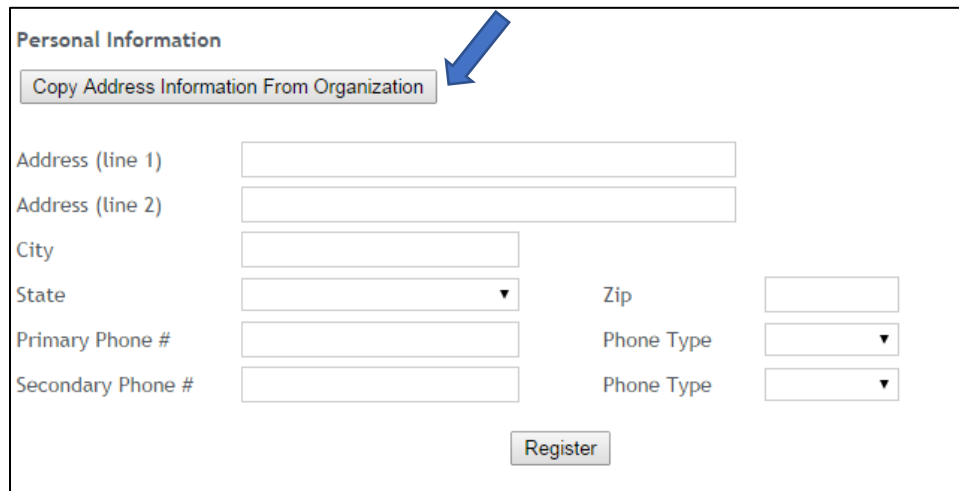
Register

Use this link to Log In

Please fill in the required information indicated by (*) and select "Register."

*NOTE: any new organization must be processed by AAF before you can access the portal. To help expedite this process, please send a **letter of determination** to grants@aaf-hf.org.*

How to Register via the Spectrum Web Portal continued

Registrants may choose to **add their Personal Information** *or leave it blank*. (If you requested the Organization Administrator or Grant Applicant role, you can copy the Organization's information into your personal information.)

Personal Information

Copy Address Information From Organization

Address (line 1)

Address (line 2)

City
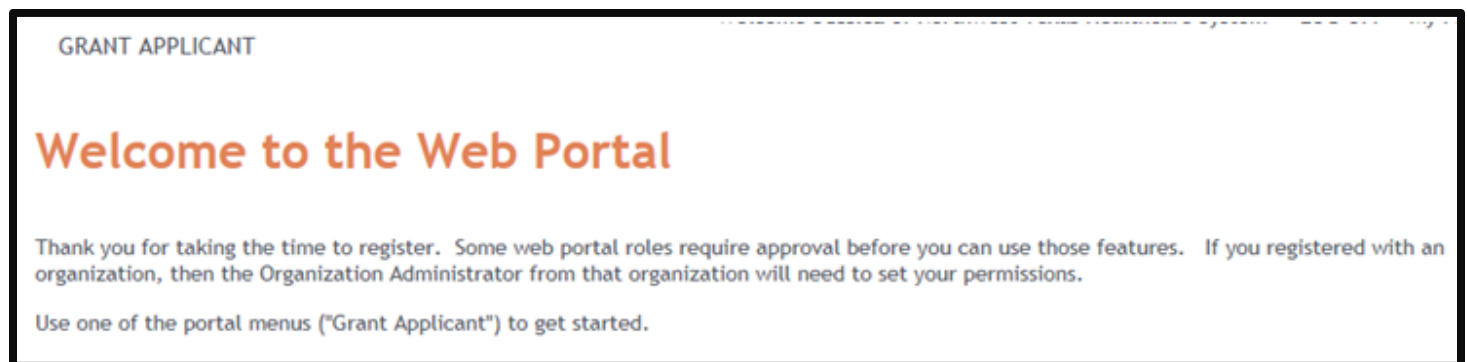
State   Zip

Primary Phone #   Phone Type

Secondary Phone #   Phone Type

Register

If the information that pulls into the fields is incorrect, please enter the correct information *prior* to selecting "Register." Foundation staff may contact you to confirm the correct information.

After clicking "Register," you will see the following message in the Spectrum Portal (or a similar one with a different role on the menu bar):

GRANT APPLICANT

Welcome to the Web Portal

Thank you for taking the time to register. Some web portal roles require approval before you can use those features.   If you registered with an organization, then the Organization Administrator from that organization will need to set your permissions.

Use one of the portal menus ("Grant Applicant") to get started.

How to Register via the Spectrum Web Portal continued

In addition, an email will be sent to your email address to confirm a successful registration:

Hello [   ]

Welcome to the Amarillo Area Foundation.

Thank you for taking the time to register on our web portal.

You requested the following roles:
Grant Applicant is Approved ⬅

Any role access that is "Pending" must be approved by the back office. You will be notified when it is approved.

You have indicated that you represent the "[   ]" organization. The web portal restricts access to applications based on the user's organization access level. You will need to have the Organization Admin () set your access level before you can use applications. They have been automatically notified by email. If you are approved as an Organization Admin then log into the web portal, go to the Organization Admin menu - Manage Members to set your access level.

You can log in any time by going to http://aaf.spectrumportal.net/Accounts/Logon.

Please do not respond to this e-mail as this e-mail address is not checked.

Thank you!

Amarillo Area Foundation
www.amarilloareafoundation.org
806.376.4521

For ACE information please contact connie@aaf-hf.org

For Scholarship information please contact scholarships@aaf-hf.org

For Grant information please contact grants@aaf-hf.org

(All roles that were requested access to will be listed where the above blue arrow indicates.)

*NOTE: *Amarillo Area Foundation staff* must **process** new organizations and **approve** Organization Administrators before they will gain access. A Grant Applicant will automatically be approved; however, until a Grant Applicant is tied to the Organization *by the Organization Administrator* they be unable to see applications or other menus.

If you have not been granted access yet, you will see the below text:

Access Denied

Your request for access to   has not yet been granted.

If you just registered please allow some time for your request to be processed. To request access contact your organization admin who is listed in your Profile.

How to Register via the Spectrum Web Portal continued

If an Org Admin has not yet been tied to a new Organization and you are a Grant Applicant seeking to be approved, the following message will appear:
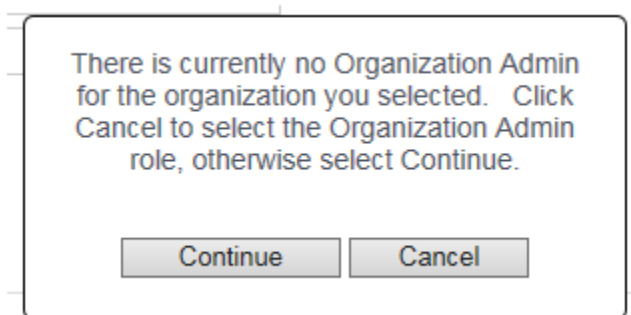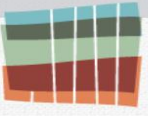
Please have your Organization Administrator register in the Spectrum portal first as indicated in the "Workflow for Registering in Spectrum" found on page 3.

If there are any questions or concerns regarding an individual's registration status, please contact the Foundation at 806.376.4521 or grants@aaf-hf.org.

Registering for More Than One Organization

aaf.spectrumportal.net

NOTE: sometimes volunteers or grant writers need access to more than one organization. If you need access to an additional organization, go to the Profile page and click "Add an Organization."

Registering for More Than One Organization continued

Once you click "Add an Organization," you will see the following:
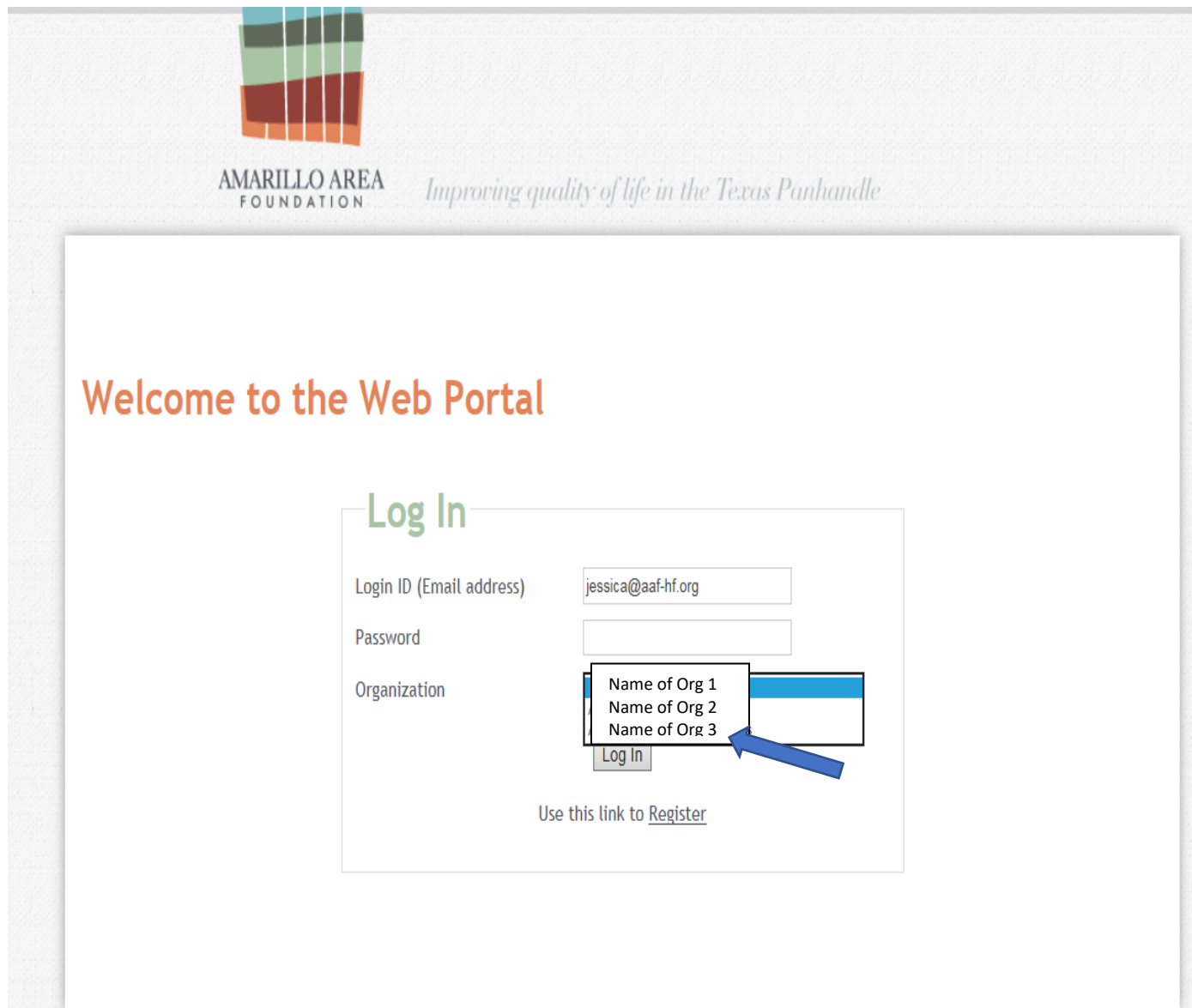
You may now type in the "Search" box the additional organization with whom you would like to be associated and select "Search." Please follow tips for searching for an organization listed on Page 5. If needed, you can add a new organization.

NOTE: The Org Admin for the organization to which you are requesting access will have to approve your access level.

Registering for More Than One Organization continued

If you are associated with more than one organization, you will be required to select the organization with which you will be working whenever you return to the "Log In" page.
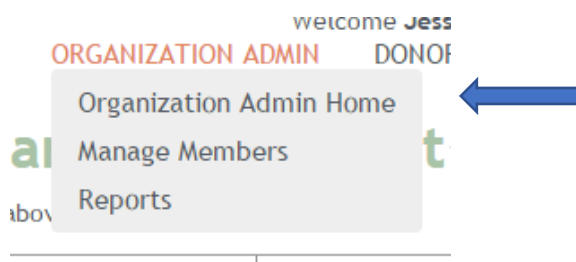
Organization Administrator

<u>LOGIN</u> at *aaf.spectrumportal.net* (You must "Register" the first time visiting the site.)

Once you are registered and "Log On" as an Organization Administrator, you will click on "Organization Admin" at the top of the page to see a drop-down menu.

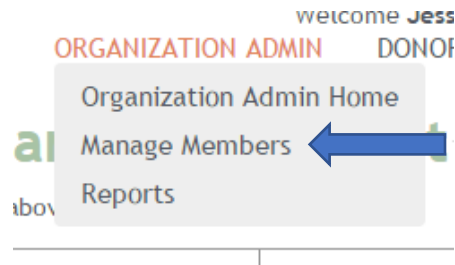The "**Organization Administrator**" menu consists of the following:

The **"Organization Admin Home"** gives you an overview of any system alerts for the organization, an application count graphic, and an overview of organization users and the number of applications they have created.
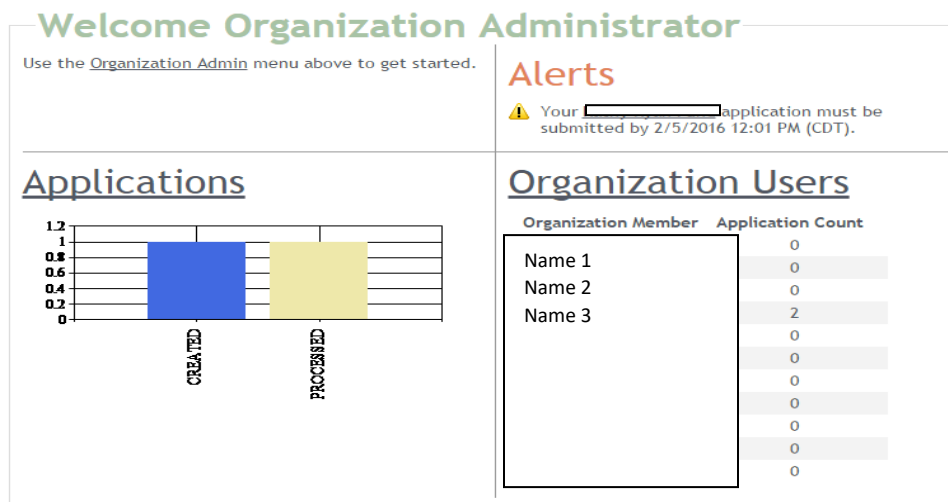
Organization Administrator continued

"Manage Members" gives you the ability to select the access level for each individual registered with your organization.

welcome Jess

ORGANIZATION ADMIN   DONOF

Organization Admin Home

al   Manage Members

Reports

abov

The Organization Administrator will receive an email when someone registers with the organization. When you receive this e-mail, log in and go to the "Manage Members" screen to set the access level for that individual. The options are:

- <u>View</u> - The ability to view applications and organization information but can make no changes to it.
- <u>Edit</u> - The ability to edit applications (but not to submit them).
- <u>Submit</u> - The ability to edit and submit applications.
- <u>Admin</u> (Organization Administrator) - Access to all aspects of the portal system for the organization including the ability to manage members of the organization.
- <u>Mine</u> - Access to only the things the individual creates (usually for scholarship recipients)
- <u>None</u> - No access to any of the organization's information.

Members

Members are added to an organization with the default access level during the registration process or from the user's profile.

The Application Access limits what a member can do with applications.
- View - Allows the member to view applications
- Edit - Allows the member to make changes to unsubmitted applications
- Submit - Allows the member to make changes and submit unsubmitted applications
- Admin - Allows the member to make changes, submit, and delete unsubmitted applications
- Mine - Allows the member to make changes, submit, and delete their own applications

Change access level here

Name	Email Address	Application Access
Name 1	Email address	Admin
Name 2	Email address	None
Name 3	Email address	View
		Admin
		View
		View
		Submit
		Edit
		View
		View
		None

Save Access Changes and Remove Selected Members

Organization Administrator continued

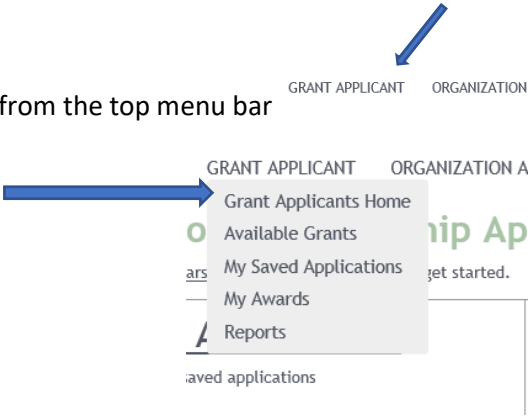The **"Reports"** page does not currently have any information in it.
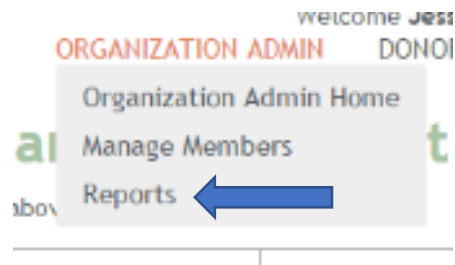
Grant Applicant

LOGIN at *aaf.spectrumportal.net* (You must "Register" the first time visiting the site.)

The **"Grant Applicant"** menu (from the top menu bar) is as follows.

The **"Grant Applicants Home"** will look similar to this ("Available Applications" will vary as will "Saved Applications"):

To see available grant proposal opportunities, select **"Available Grants"** (or Click on **"Available Applications"** from the above Grant Applicant home page)
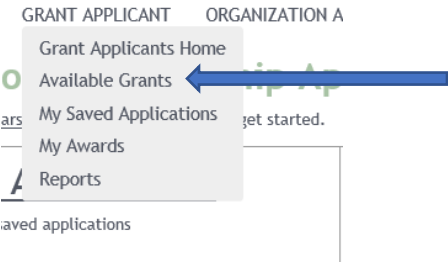
Grant Applicant continued

The **"Available Grants"** page looks like this:

Available Grants

This page lists all the grants we have available. If the grant is currently accepting applications online you will be able to click on the grant name to open an application.

Search Criteria [   ] [Perform Search]

Sort Grants	Accepting Applications
Amarillo Area Foundation/Don and Sybil Harrington Foundation	Now

The AAF/HF Discretionary Grant Program accepts grant requests of over $20,000 from charitable organizations located within and serving the northernmost 26 counties of Texas. Please note that requests from $2,500 to $20,000 need to go through the Catalyst Grant Program application. 2017 deadlines will be March 1 at noon, June 30 at noon, and a possible November 1 at noon deadline dependent upon availability of funds. Please see amarilloareafoundation.org/grants for more information about the Discretionary (and Catalyst) Grant programs, including financial requirements, exclusions, and priorities.

Catalyst Grant Proposal	Now

The AAF/HF Catalyst Grant Program accepts grant requests between $2,500 to $20,000 from charitable organizations located within and serving the northernmost 26 counties of Texas. Please note that requests over $20,000 need to go through the Discretionary Grant Program application. 2017 deadlines will be March 1 at noon, June 30 at noon, and November 1 at noon. Please see amarilloareafoundation.org/grants for more information about the Catalyst (and Discretionary) Grant program, including financial requirements, exclusions, and priorities.

Pattern Panhandle Wind (Civic) Grant Proposal	Through 2/28/2017 12:01 PM (CDT)

Competitive grants ranging from $2,500 to $25,000 for to support and develop new and existing programs that improve quality of life of Carson County residents and communities.

Pattern Panhandle Wind (Education) Grant Proposal	Through 2/28/2017 12:01 PM (CDT)

Competitive grants ranging from $2,500 to $25,000 for kindergarten through twelfth grade public schools or organizations supporting public schools in Carson County.

The underlined name is the name of the grant application (usually includes the Grant Program name) and the description below it is a brief description of the program/application. Please refer to AAF's website for full information on any grant application opportunity.

Underneath "Accepting Applications" will tell you whether or not the program is currently accepting applications.
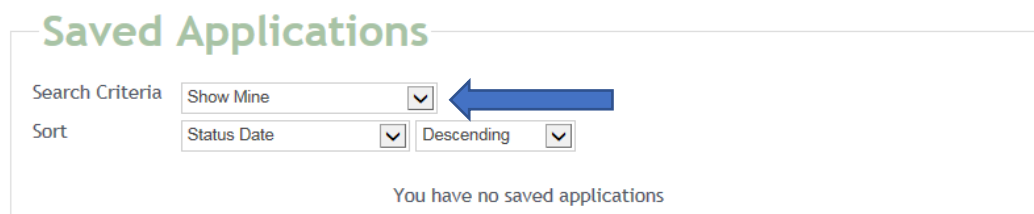
Click the grant application name (underlined) to open the application.
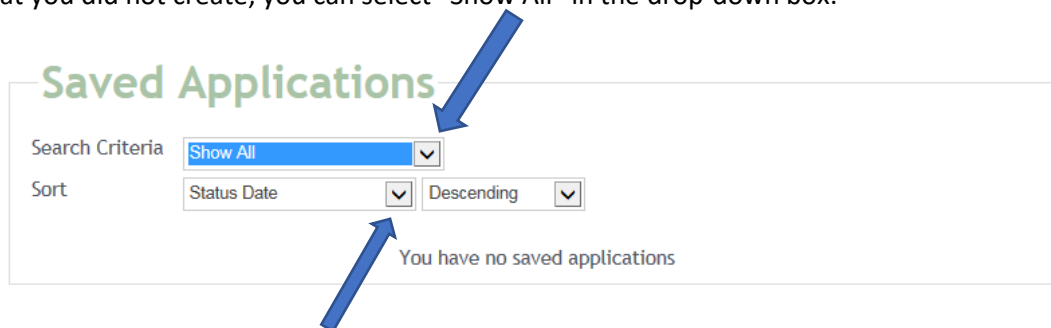
Grant Applicant continued

To see saved grant applications for your organization, select **"My Saved Applications"** (or select **"Saved Applications"** from the Grant Applicant Home page).
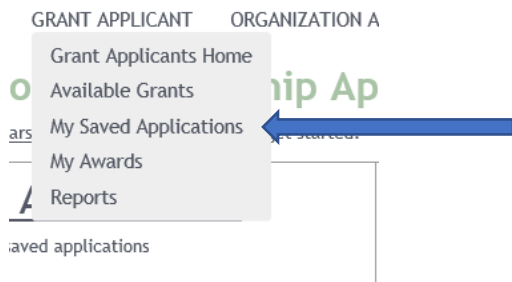
Your **"Saved Applications"** page will look like this:

When you first click on "Saved Applications" you will only be able to see *applications you have created* because the filter on the drop down box for search Criteria defaults to "Show Mine." If you have access to see grant applications for the organization that you did not create, you can select "Show All" in the drop-down box.

You can also change the way the saved applications are sorted by using the drop-down boxes beside the word "Sort."

Grant Applicant continued

If you need to delete a grant application that has been created, you may select and delete the application from this page by clicking the "Delete" button.

To see a history of awards for your organization, select **"My Awards."** (NOTE: this will only show awards from applications *created and submitted from the spectrum portal and not a full history of funding for your organization.)*

The **"Reports"** page does not currently have any information in it.

Grant Application

This is an example of what you see when you click on a grant application name:

CONTACT | NEWSLETTER

AMARILLO AREA
FOUNDATION

Improving quality of life in the Texas Panhandle

Exit   Save   Save and Exit   Printer Friendly Version

Catalyst Grant Proposal

NOTE: PLEASE USE INTERNET EXPLORER and fill out the application completely. Contact grants@aaf-hf.org or Kathie Grant, Grants Administrator, at 806.376.4521 if you have questions.

The AAF/HF Catalyst Grant Program provides accepts grant requests between $2,500 to $20,000 from charitable organizations located within and serving the northernmost 26 counties of Texas. Please note that requests over $20,000 need to go through the Discretionary Grant Program application. 2017 deadlines will be March 1 at noon, June 30 at noon, and November 1 at noon. Please see amarilloareafoundation.org/grants for more information about the Catalyst (and Discretionary) Grant program, including financial requirements, exclusions, and priorities.

* indicates required field

Save Your Changes - Click save every 15 minutes while making changes

| Contact Information | Organization Information | Organization Financial Information | Project Information |
| Attachments - Catalyst Grant |

Please enter the information for the person whom the Foundation should contact regarding this grant proposal.
Contact Name   **Contact Title**
Contact Work Phone   **Contact Alternative Phone**
Contact e-mail address

Is the contact person the Executive Director/CEO?   ◯ Yes ◯ No*

Next   Save

Fill in each of the appropriate boxes on the "**Contact Information**" and "**Organization Information**" tabs, especially those boxes marked by a (*) red asterisk.

Grant Application continued

An example page on the "**Organization Financial Information**" tab looks like this:

If you are having trouble entering a monetary amount for budget requests, do not use symbols such as dollar signs or commas as these symbols will auto populate after typing in the number. Click the TAB key to be sent to the next box.

When uploading documents in the Spectrum portal, there are requirements for attachment types and sizes.

Unless otherwise specified, any attachment uploaded into the Spectrum Portal must be a **file size of 10MG or less** and be one of the following file extensions:

- Word document (.doc or .docx)
- Excel document (.xls or .xlsx)
- PDF (.pdf)
- Picture (.jpeg, .gif, .tiff, or .png)

Grant Application continued

A blue question mark beside a field indicates there is additional helpful information related to the field.

If one clicks on the blue question mark a small screen with additional information will pop up. To close the help box, simply click the black X in the top right-hand corner of the pop up box.

Certain questions (example below) might require you to select more than one option in the list. To do so:

1. Click on one of the options to select it
2. Push and hold the control button down on your keyboard
3. Click on the additional option by clicking on it, repeat until all correct selections are made
4. Release control button

If an error message occurs that has not been addressed in these Grant Application instructions, please take a screen shot of the error message to send to grants@aaf-hf.org. A grants team member will get back to you as soon as possible.

Reporting through aaf.spectrumportal.net

There are two ways to get to a report in the Spectrum Portal.

OPTION 1

From the **Grant Applicant** menu, select "Grant Applicants Home."
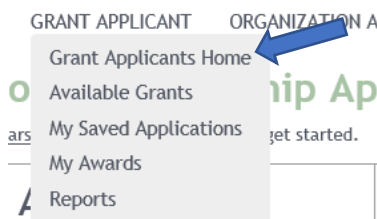
Reports are considered "follow-up actions" in the Spectrum Portal and will show up under "Alerts".
Click on the "Proposal Title" to open the grant record.
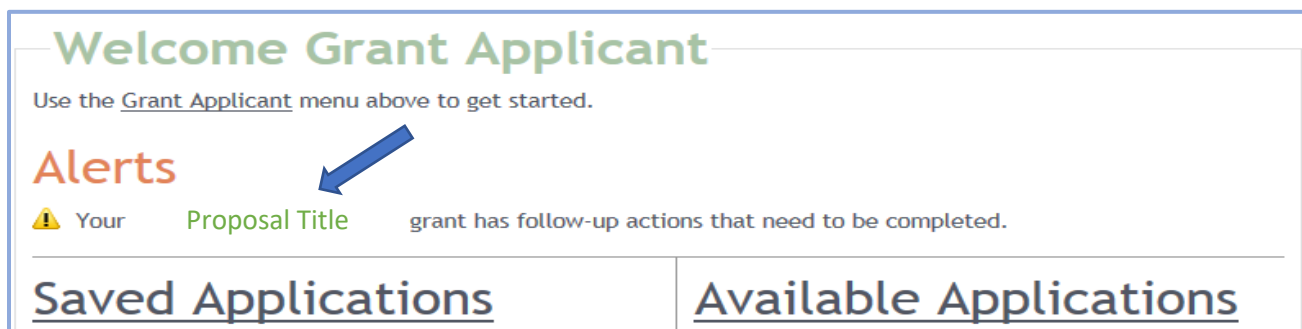
OPTION 2

Click on "My Awards" from the Grant Applicant menu:

Click on the Proposal Title to open the grant record

Grants awarded will be listed here. If you do not see the awarded proposal, change the search criteria.
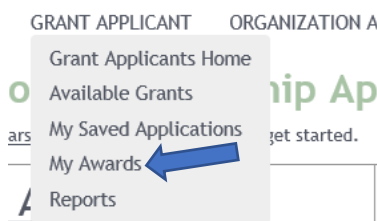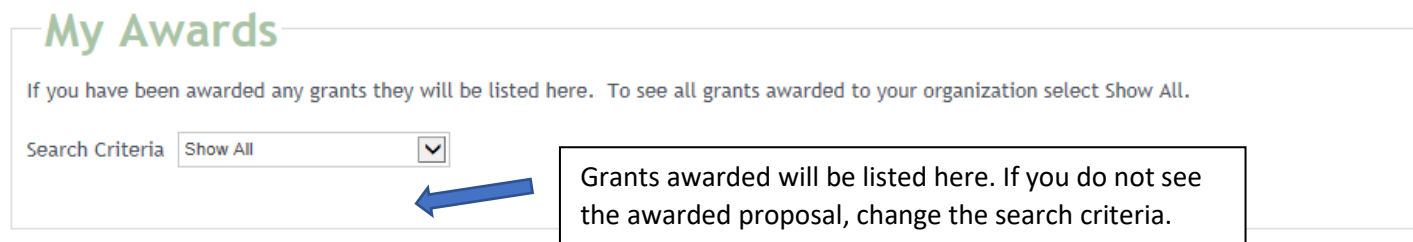
Reporting continued

The Grant record will be open and look similar to this:

Proposal Title

Summary
Summary of purpose of grant
Date Submitted: Date
Approved Amount: Grant Amount
Recipient: Recipient organization name

Status
PROCESSED

Payment Schedule

Payee	Amount	Scheduled Date	Status	Date Paid	Check #
Payee organization name*	Check Amount	Date scheduled to be paid**	Scheduled	Date paid ***	Check # ***

Follow-up

Action	Due Date	Date Completed
Report	5/31/2017	

*If **Recipient** and **Payee** are the same, these two fields will be the same. If, for example, Recipient requires a fiscal sponsor, the fiscal sponsor will show up in the Payee field.

For Foundation Grant Programs, the **Scheduled Date will be blank until a signed grant agreement is received by the Foundation and _all the contingencies have been met_.

***The **Date Paid** and **Check #** fields will be blank until the _grant check is printed_.

Reporting continued

Click on the "Report" to open that page. The report page will open and look similar to the below image. Please note, when the Report is due, fill out the report form completely and hit the **"Save/Submit"** button at the bottom of the page.

Exit   Save   Save and Exit   Printer Friendly Version

2018 AAF/HF Discretionary Grant Application

NOTE: PLEASE USE INTERNET EXPLORER to fill out the application completely. Contact grants@aaf-hf.org or 806.376.4521 if you have any questions. Unelss otherwise specified, any attachment uploaded in the Spectrum Portal must be a file size of 10MB or less and be one of the following file extensions: Word document (.doc or .docx, Excel document (.xls or .xlsx), PDF (.pdf), or Picture (.jpeg, .gif, .tiff, or .png).

* indicates required field

Save Your Changes - Click save every 15 minutes while making changes

| Contact Information | Attachments | General Financial Information | General Organization Info |

| Proposal Information | General Project Information | Progress Report | **Report** |

Instructions:
The answers to the grant report narrative must relate directly to the *funded* grant. The answer to each question should not exceed three thousand characters.

1. **PROGRESS AND RESULTS**

(a) Describe the progress made toward the goals and objectives as stated in the funded grant application. *

(Characters left: 3000)

(b) Summarize the organization's key evaluation results related to the funded grant.

(Characters left: 3000)

2. **SUCCESSES AND CHALLENGES**

Describe the significant successes and challenges the organization experienced related to the funded grant. *

(Characters left: 3000)

3. **LESSONS LEARNED**

Describe what the organization learned based upon the results, successes, and challenges reported in Questions 1 and 2. Address programmatic, evaluative, or organizational changes that will be made based upon these lessons learned. *

(Characters left: 3000)

4. **ADDITIONAL INFORMATION**
Share anything else that happened during the grant period that impacted the organization, either positively or negatively.

(Characters left: 3000)

Reporting continued

Instructions:
Submit the following attachments along with the narrative report. Please note that you may be providing financial statements for more than one year to cover the funded grant period. It is generally understood that the fiscal year(s) of the funder, nonprofit, and grant period may not be in alignment. For further clarification on any of these items, please contact the Amarillo Area Foundation.
Note: The file size limit for attachments is 10MG.

1. FINANCIAL STATEMENTS

(a) Submit your organization's Statement of Financial Position (Balance Sheet) and Statement of Activities (Income and Expense Statement) for the year(s) in which the grant was used.

[   ] *? [Upload File]

(b) If reporting on a specific program/capital budget, also submit income and expenditure information compared to the approved budget for the program/capital project.

[   ] *? [Upload File]

2. ACCOMPANYING NARRATIVE
*Please note the character limit for answers in this section is 1,500.

(a) Explain any significant changes in the organization's financial position since the grant was awarded.

[   ]

(Characters left: 1500)

(b) If all funding was not expended during the grant period, explain why.

[   ]

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(c) For program and capital grants, explain any major variances between the approved budget and the final financial statements being submitted with this report.

[   ]

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3. EVALUATION RESULTS

If available, provide the organization's most recent evaluation results or findings, relevant to the funded grant.
Note: providing these attachments does not take the place of answering Question 1(b) in the narrative section.

Evaluation Attachment 1 [   ] ? [Upload File]
Evaluation Attachment 2 [   ] ? [Upload File]

4. ADDITIONAL RELEVANT INFORMATION
Please attach any additional documents pertinent to the awarded grant.
For capital projects, please upload a couple of good pictures of the project.
For programmatic grants, please upload a couple of good pictures of the program implementation if you have any.

[   ] ? [Upload File]

[Previous] [Save]